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Report Highlights: Vietnam's livestock sector continues to expand quickly. The Government of Vietnam has encouraged swine farmers to expand production, so Vietnam can become a regional pork exporter. The Government is also encouraging farmers to expand dairy herds and milk production to reduce Vietnam's growing imports of milk powder. The poultry sector remains a high-cost producer and is not seen as a key investment area.

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EXECUTIVE SUMMARY

The key components of Vietnam's livestock industry are the swine, poultry, and dairy cattle sectors. The swine sector is by far the leading livestock generator of rural income and meat production. Production of other animals (ranging from rabbits to goats to sheep) remains very low. The demand for dairy products (fresh milk and processed products) is increasing as, mostly urban, disposable income rises.

Buffalo are grown to work the fields, not as a source of meat. Over the last 5 years, the size of the buffalo herd has remained roughly 3 million head.

In calendar year 2001, total meat production was about 2 million metric ton (mmt), an increase of 8.5% compared with 2000's level. Pork accounts for more than 75% of total meat production, while the shares of poultry and cattle meat are 15% and 7.5%, respectively. The remaining 5% is from goats and rabbits, as very few sheep are grown in Vietnam. The Ministry of Agricultural and Rural Development (MARD) estimates that fresh milk production is about 60 thousand metric ton (tmt), a growth of 15% compared with 2000's level (see table 1).

Table 1: Vietnam's Animal Population and Meat Production.

	Unit	1998	1999	2000	2001est.
TOTAL ANIMAL POPULATION	Thousand head	193,472	226,744	227,808	249,000
of which beef cattle	Thousand head	3,984	4,064	4,127	4,200
Dairy cattle	Thousand head	27	29	35	40
Swine population	Thousand head	18,132	18,886	20,194	21,000
Poultry population	Thousand head	167,890	197,232	198,046	220,000
Buffalo	Thousand head	2,951	2,955	2,897	2,950
TOTAL MEAT PRODUCTION (in live weight)	Thousand metric ton	1,608	1,712	1,836	2,000
of which cattle meat	Thousand metric ton	85	91	92	99
Pork meat	Thousand metric ton	1,231	1,318	1,409	1,500
Poultry meat	Thousand metric ton	250	262	287	300
Buffalo meat	Thousand metric ton	43	41	48	51
MILK PRODUCTION	Metric ton	32,000	39,692	52,172	60,000

Source: MARD and General Statistical Office

The Government of Vietnam, looking at export markets (swine) and import substitution (dairy) schemes, has defined the swine and dairy sectors as the most important sectors to develop in near term. Therefore, this report will focus on these two sectors.

SWINE SECTOR

The swine sector remains the most important part of the livestock industry in Vietnam. In 2001, pork production (live weight) was 1.5 mmt (see table 2), an increase of 7% compared with 2000's level. About 70% of the pork was sold as fresh meat at local markets. The remaining is used for exports and the food processing

industry.

Table 2: Share of Pork Meat Production in Total Meat Production

	1990	1998	1999	2000	2001est
Total Meat -- live weight production (TMT)	1,007	1,593	1,711	1,859	2,000
Pork -- live weight production (TMT)	729	1,227	1,318	1,409	1,500
Share of Pork production per total meat production (%)	72	77	77	76	75

Source: Agricultural Extension Department.-MARD

Pig Population

The MARD estimated Vietnam's 2001 pig population at 2.1 million head, and pork production at 1.5 million metric ton (MMT). To compare with 2000's level, the growth rates for the pigs and pork production was 6% and 4%, respectively.

Vietnam's pig herd is dominated by local and hybrid breeds. About 35-40% of the total herd are local breeds and the remaining are hybrid animals that are crossbred between local breeds and exotic ones. Only about 5% of the total herd is pure exotic swine breeds. Local pigs have slower growth rates and low lean meat ratios. The average lean meat ratio of Vietnam's pigs is about 30-35%, much lower than the rate (45-50%) required for export. Therefore, one of MARD's highest priorities is to increase pork quality through improving swine genetics. Pig production is characterized by small or medium-sized farms, with the average farm having about 5 to 100 pigs. There are a few state-owned enterprises that have larger operations with 500 to 1,000 pigs.

Pork Exports Increase in 2001

Vietnam's calendar year 2000 pork exports were about 12,000 metric ton (mt) (see table 3). Hong Kong was the biggest importer, with imports of 8,000 mt of suckling piglets and frozen medium sized pigs. Russia tied for second place with imports of 2,000 mt, with an additional 2,000 mt shipped to China.

According to Vietnam's Customs Department, Vietnam's 2001 pork exports were estimated at 25,000 mt, excluding some pork exported to China through unofficial channels. The Commonwealth of Independent States (CIS), Hong Kong, and China were also major markets for Vietnam's pork. Frozen pork meat is the main item exported to CIS, while customers in Hong Kong prefer Vietnam's suckling piglets and frozen medium sized pigs. Pigs for export are mainly supplied by Red River Delta (RRD)'s provinces such as Hai Phong, Nam Dinh, Thai Binh, Ha Tay and Hai Hung. According to MARD, exports would have been higher if Vietnam had more meat available for export.

Vietnam Livestock Cooperation (Vinalivesco) received orders to export 20,000 mt of suckling piglet to Hong Kong and Vissan Import Export Cooperation (Vissan) also received orders for 20,000 of frozen pork to the CIS, but neither company could satisfy importers's requirement as they were unable to purchase enough

exportable pork of suitable quality and price.

Table 3: Vietnam Pork Meat Exports

	1990	1997	1998	1999	2000	2001 est.
Meat export (MT)	16,156	10,000	6,000	10,000	12,000	25,000

Source: Traders & MARD

Vietnam's pork exports are constrained by low quality meat, a lack of animal inspection service agreements with importing countries, and price. Low quality pork is mainly caused by the local breeds that have a low lean-meat ratio. The problem (too fatty and not enough lean meat) is further compounded by the low quality animal feed used by most small farmers. More than 70% of the animal feed is home-mixed feed that utilizes farm residues (see Animal Feed sector, below).

Regarding bilateral veterinary agreements, Vietnam has recently signed a meat inspection agreement with Russia. The agreement is expected to simplify (and clarify the conditions of) Vietnam-Russian trade in meat and meat products. Hong Kong has granted hygiene certificates to 14 Vietnamese suckling piglet exporters. Only companies with hygiene certificates are authorized to export frozen suckling piglets to Hong Kong. Other importing nations, such as China, Korea, Malaysia, Singapore and Japan, have only granted Vietnam short-term export licences. The temporary licenses lead to unstable market surges, and the Government is trying to negotiate long-term veterinary agreements with those countries.

MARD's Department of Animal Health (DAH) has been tasked with obtain veterinary agreements with potential pork importing countries. Some of MARD's experts have noted that it is not easy to negotiate veterinary agreements with foreign countries since most of Vietnam's swine farms are operated by small farmer households where the quality and sanitation are not assured.

Vietnam's pork exports, especially to some key markets like the CIS and Japan, are facing fierce export price competition with China. According a key trading source, it costs about \$750 to produce a metric ton of exportable pork in the RRD, and between \$900 to \$1,000 in the Mekong River Delta (MRD). Trade sources estimate the equivalent costs in China are only \$650 to \$800. Vietnam's high pork production costs area mainly caused by high feed prices. To raise pigs for exports, farmers use commercial feed that is much more expensive than home mixed feed. The cost of animal feed accounts for more than 70% of the total pig production cost.

The poor hygienic status of Vietnam's processing plants is yet another obstacle for pork exports. Currently, Vietnam has about 20 pork processing facilities with the average production capacity of 1,500 - 5,000 metric tons per year. Vissan, a state-owned food processing company in Ho Chi Minh City, owns the largest meat processing facility in Vietnam, with an annual capacity of 20,000 metric tons. In the north, Hai Phong Food

Processing Company (owned by the state-owned Vinalivesco Company) has a working capacity of 10,000 metric tons per year. However, only Vissan's slaughtering house conforms to international hygienic standards.

Ambitious Pork Meat Export Plan for 2001-2010

On October 26, 2001, Vietnam's Deputy Prime Minister Nguyen Cong Tan signed Decree 166/2001/QD-TTg on development of pork exports during the 2001-2010 period. Accordingly, Vietnam plans to export 80,000 mt and 100,000 mt of pork by 2005 and 2010 respectively. [Post notes those ambitious targets will be difficult to achieve.] The RRD, South Coastal and South East regions are designed as pig producing zones for export. MARD is assigned to manage state-owned Great Grand Parent (GGP) breeding farms to improve swine genetics sources.

In July 2000, MARD's National Institute of Animal Husbandry (NIAH) bought the most modern GGP breeding farm in Vietnam from a foreign-owned company (PIC-Vietnam) for \$750,000. The foreign-owned PIC-Vietnam company was established in 1997 by the PIC International Group. Reportedly, NIAH received assets worth well over one million, as PIC-Vietnam had decided to close their money-losing operation in Vietnam. PIC-Vietnam had constructed a modern GGP farm on an area of 20 hectares in Tam Diep District of Ninh Binh province (about 70 km from Hanoi). The farm manages GGP, Grand Parent (GP) and Parent Stock (PS) by using 5 lines: Landrace, Duroc, Largewhite, Meishan and Paitrain to produce crosses for the local farmers.

Vietnam Creates A Export Bonus for Pork

Another measure the GOV has implemented to increase pork exports is to award export bonuses to pork exporters. On June 29, 2001 the Finance Ministry issued a degree to give export bonuses to four agricultural products, including pork. Accordingly, pork exporters will get VND 400 (2.6 U.S. cents) and VND 900 (5.9 US cents) for every \$1 value of export earnings from frozen suckling piglets and pork, respectively.

Vietnam is Keen to Improve the Swine Breeds

MARD is keen to improve local swine breeds by importing exotic breeds. In 2001, Vietnam imported about 550 breeding swine from different countries including the United States, Canada, Denmark and Thailand. Both state-owned and private-sector companies are importing exotic breeding swine. Under MARD's Animal Breeding project, Thuy Phuong Pig Research Center (in the North) and Binh Thang Livestock Research Center (in the South) imported 134 and 87 of GGP swine from the United States, respectively. In Ho Chi Minh City, the First Grade Pig Breeding Farm (that is the legal name) and Kim Long Company were reported to have imported 102 breeding swine from Canada. In Dong Nai province, Phu Son Pig Breeding Company imported 54 swine from the United States, while the Dong Nai pig breeding company imported 32 breeding swine from Denmark.

In 2002, MARD will probably import 200 GGP breeding swine for the Tam Dao breeding farm, near Hanoi. MARD had intended to buy the swine in 2001, but the farm facilities were being upgraded. Reportedly, U.S. and Canadian swine breeds are being considered.

DAIRY CATTLE SECTOR

In Vietnam, milk consumption, formerly considered a luxury, is now increasing rapidly -- especially in urban areas. In 2001, domestic consumption of milk and milk products was around 500 thousand metric ton (tmt). The milk and milk product consumption per capita was 6.5 -6.7 kg, ten times bigger than the 1990's level. The most common milk products available in Vietnam are UHT milk, pasteurized milk, yogurt, fruit flavored milk and powdered milk. Vietnam plans to increase milk consumption to 8-9 kg/ per capita by 2005. To meet the planned target, more investments are needed to improve the dairy sector including the expansion of number of dairy cows, and improvement of the dairy processing industry.

Vietnam 2001's fresh milk production was 60 thousand metric ton that meets only 10-12% of milk demand for milk processing industry

Dairy Cattle Population

According to MARD, the dairy cow population in 2001 was 40 thousand head, an increase of 20% compared with 2000's level. About 85% of the herd is raised in the Southern provinces such as Binh Duong, Long An, Lam Dong and Ho Chi Minh City suburbs. Ho Chi Minh City (HCMC) has the biggest dairy herd as well as the best milk yields in the country. The current HCMC dairy cow herd is 25 thousand head, of which 76% are milking cows. The average milk yield of Ho Chi Minh City's dairy cows is about 3,720 kg/lactation. In the Northern provinces, dairy cows herds are expanding and enjoying the conditions in Hanoi, Ha Tay, and the Moc Chau plateau regions of Son La province.

About 90% of Vietnam's cows are hybrid breeds resulting from crosses between Holstein Frisian (HF) with Indian/Pakistan Red Sindhi breed. Vietnam has 1,600 to 1,800 pure HF cows being raised in Lam Dong (Tay Nguyen Highland) and Moc Chau (Son La province). The average milk yield of HF cows is ranging from 3,600 to 4,400 kg per a milking period.

Dairy Processors

Currently, the total capacity of the existing six dairy processing plants is about 450-460 thousand metric ton (fresh milk equivalent) Four of the plants are operated by the state-owned Vietnam Milk Company (Vinamilk). In addition there is one joint-venture (Foremost and a Vietnamese partner), and one fully-owned foreign-invested company (Nestle). Vinamilk is the biggest milk processor and distributor in Vietnam. Their products occupy 85-90% share of the domestic market. Currently, Vinamilk is providing 157 milk products to the market through 14,000 agents nation-wide. Foremost is the second big milk distributor in Vietnam. Currently, this Dutch-Vietnamese company has 132 distributing agents, mainly in Ho Chi Minh City, the provinces of the

Central Coast, and in the Mekong River Delta. Nestle operates a fresh milk dairy in Ba Vi about 70 kilometers from Hanoi.

There are several new dairies expected to begin operation in 2002. Given the shortage of fresh milk, those operations are designed to use imported milk powder.

Vietnam Milk Cooperation (Vinamilk) Expanding Milk Purchasing Facilities

To increase supplies for the milk processing industry, Vinamilk, the largest state-owned milk company, has expanded their milk purchasing bases (cooling and collection facilities) and milk processing plants in different dairy growing regions such as Tay Nguyen highland, the MRD and the South Coastal. In 2001, Vinamilk established a milk facility in Lam Dong province (Tay Nguyen highland) that is capable of storing 4.8 metric tons of fresh milk to be transported to their milk processing plants in Ho Chi Minh city every day.

In May 2001, the company opened a milk processing plant in Can Tho province (the MRD) which has a designed annual capacity of 10 million liters of yogurt, 20 million liters of fresh milk and 2,000 metric tons of milk products like biscuits and ice cream. In theory, fresh milk supplied to this plant will be collected from dairy farms in the MRD. To meet the plant's yearly demand of 30 million liters of fresh milk, the dairy cow population in the MRD is expected to increase to 15,000 to 16,000 head. However, to date, milk production in the MRD has not been sufficient to supply Vinamilk's new processing plant, so Vinamilk has been trucking milk from Ho Chi Minh City down to Can Tho.

In 2002, Vinamilk will spend \$5-7 million to build a milk processing plant which has the capacity of 20 million liters of milk a year in Nghe An province (North Coastal region). In addition, Vinamilk and a local partner in the Binh Dinh province of the South Coastal region have started their production at small volume on a milk processing plant with a designed capacity of 21 million liters of milk. The estimated capital of the plant is about VND 33 billion (\$2.1 million).

Milk and Milk Product Imports to Vietnam

Vietnam imports different kinds of milk products including powdered milk, pasteurized milk and skim powder milk for domestic consumption and for the milk processing industry. In 2001, milk and milk products imports were estimated at 350-400 tmt of which 300-350 tmt was used as materials for milk processing. Milk is imported from many different countries, including Holland, Australia, New Zealand, Poland, France, Japan and the United States.

Exports of U.S. milk products to Vietnam are increasing. In 2000, the total export value of U.S. milk products to Vietnam was \$6.179 million. In the first 11 months of 2001, Vietnam imported U.S. products at a value of \$9.596 million, an increase of 59% compared with the same period of 2000. U.S. powdered milk (1-6% fat), whey, and milk powder over 6% fat were the major products imported by Vietnam.

Export of Dairy Products

Vinamilk is the leading milk exporter in Vietnam. In 2001, the total value of their milk product exports was \$137 million, an increase of 37% compared with 2000's level. The main export markets include Middle East, the CIS, China, South Asia, Cambodia and Laos. The company plans to earn \$157 million from exports in 2002.

Vietnam Sets Dairy Program Targets for 2001-2010

Vietnam has announced an ambitious plan to develop the dairy sector. As indicated in Decree 169/2001/Ttg signed by Deputy Prime Minister Nguyen Cong Tan on Oct 26, 2001, Vietnam plans to have 100 thousand dairy cows and milk production up to 163 tmt by 2005. The number of dairy cows should increase to 200 thousand and the milk production is targeted at 350 tmt to meet 40% of milk demand in 2010. Annual milk production is designed to exceed 1 million metric ton after 2010. Post notes those ambitious targets will be very hard to achieve.

Dairy cow raising zones were also defined in the Decree. The first zone is in the Northern provinces including Ha Tay, Bac Ninh, Vinh Phuc, Phu Tho, Bac Giang, Thai Nguyen, Ninh Binh, Thanh Hoa, Nghe An and Son La. The second zone is in the Central region, that includes Binh Dinh, Quang Nam, Quang Ngai, Khanh Hoa, Phu Yen provinces. Southern provinces including Binh Duong, Binh Phuoc, Dong Nai, Tay Ninh, Long An, Can Tho provinces and Ho Chi Minh city are defined as good places for the development of the dairy herd. Dac Lac, Lam Dong, Gia Lai and Kon Tum provinces of the Tay Nguyen highland were also identified as good areas to expand dairy cow production.

MARD plans to encourage farmers to convert some 5,000 hectares of low-income generating agricultural land to pasture over the next 10 years. As farmers shift away from coffee, rubber, and other crops (including rice), they will be encouraged to start dairy herds.

U.S. Dairy Cows to Vietnam

In December 2000, a shipment of 100 Holstein cows, 93 Jersey cows, 7 Holstein bulls and 2 Jersey bulls from the United States arrived in Vietnam. This shipment was partially financed by MARD's Dairy Cow Development project and partially by the FY-2000 USDA's Section 416 (b) program. According to MARD's officers, the high yielding U.S. cows will contribute to improvement of Vietnam's dairy herd's milk yield.

Two Vinalivesco member companies, namely Moc Chau Dairy Breeding Farm (in Son La province) and Lam Dong Dairy Company (in Lam Dong province- Tay Nguyen Highland), will be home for 49 and 30 Holstein cow respectively. The remaining 20 Holstein cows will be raised at Ba Vi Cattle and Forage Research Center under the umbrella of the National Institute of Animal Husbandry (NIAH).

A private company in Ba Vi, working with MARD, will set-up a model dairy farm with the 68 Jersey cows. The remaining 25 Jersey cows and 9 bulls will go to Ba Vi Cattle and Forage Research Center.

Milk Processors Also Investing in Cows

To reduce dependence on imported milk powder, milk processing companies are also investing in dairy cow production. Vinamilk assists dairy farmers and enterprises with cattle raising techniques and then assures them that Vinamilk will buy all the milk from them. Vinamilk has submitted to the Ho Chi Minh City's People Committee a proposal to establish a breeding dairy farm of 100 hectares. The company plans to import 400 good quality breeding cows in order to supply dairy cows to farmers. In Ho Chi Minh City and surrounding provinces like Binh Duong, Dong Nai, Foremost also finances farmers to raise 7,000 dairy cows to supply fresh milk for their company. In the North, some companies like Nestle, Moc Chau Dairy Breeding Company (a member of Vinalivesco) also provide financial and technical assistance to farmers to develop their dairy herds.

Wanted - Dairy Cows

As result of the Government's program to expand milk production, prices of dairy cows have started to increase, especially in the Southern provinces. In 2001, the dairy cow price in Ho Chi Minh City increased by 30-40% compared with 2000's level as farmers from the Mekong River Delta (MRD)'s provinces to buy dairy cows. Currently, a 12-month-old cow costs VND 9-12 million (\$601-802) while the price of a pregnant cow is VND14-15 million (\$935-\$1,000) and price of a productive cow is VND 20 million (\$1,336).

To meet the increasing demand for dairy cows, local provinces are importing breeding cows. The Agricultural Department of Ho Chi Minh City, Can Tho province (in MRD) and Tuyen Quang province (in the North) are going to import 900 dairy cows (Holstein & AFS breeds having milk yields of 4,500-4,800 kg /period in Australia) and 300 cattle from Queensland (Australia) where the weather is hotter but the humidity is lower than it is in Ho Chi Minh City. The estimated cost is about \$1,200/head.

The import demand for dairy cows is predicted to increase in 2002. Ho Chi Minh City plans to import 1,500-2,000 cows to increase their dairy herd to 41 thousand by 2005. Vinamilk is planning a dairy breeding farm for which they will import 400 breeding cows to supply heifers to dairy farmers. Other local provinces in the MRD, Tay Nguyen Highlands, and Northern provinces also have their own programs to develop the dairy sector. Therefore, they are looking for good breeding cows from foreign countries including Thailand, Australia, and the United States.

ANIMAL FEED INDUSTRY

Annual demand for animal feed in Vietnam is estimated at 10 million metric ton (mmt). Commercial animal feed production accounts for 20-25% of the total animal feed output. In 2000, according to Ministry of Agricultural and Rural Development (MARD), there were 110 animal feed mills operating in Vietnam which produced

about 2.1 million ton of commercial animal feed (roughly 75% of their production capacity). Most of the animal feed mills (about 75% of the total) are allocated in the southern provinces.

In 2001, the number of animal feed mills increased remarkably. The country's commercial animal feed production capacity is estimated to have increased by at least 0.5 mmt. Many new animal feed mills were put into operation or are under construction in all regions of the country. In the Mekong River Delta, Vina Agri (the Joint Venture with Chiel Jedang Cooperation-Korean) located in Long An province started production in March 2001, with a annual capacity of 120 tmt of feed. In the Red River Delta, Viet Phat feed mill (30 mt/year) and VIC company (150 tmt/year) in Hai Phong city, Ngoc Hoi Animal Feed in Hanoi (70 tmt/year), and an animal feed mill in Bac Ninh province is being built. In Quang Ninh province, Thien Thien Bien animal feed mill had started production with an annual capacity of 10 tmt.

In 2001, the total capacity of animal feed mills is estimated at 3.0-3.3 mmt, although actual production is about estimated lower at 2.2 mmt. Post forecasts that commercial animal feed production in Vietnam will increase to 2.4 mmt as a result of the increasing number of animal feed mills as well as Government programs to promote the development of the swine and dairy sectors (see table 4).

Vietnam's animal feed industry heavily relies on protein supplying inputs such as soybean meal, corn gluten, and amino acids. In 2001, soybean meal imported to Vietnam increased to 520 tmt from 400 tmt in 2000 as the sector produced more concentrated feed used as input for home mixed feed production. India and Argentina are the leading soybean meal suppliers to Vietnam. In 2002, Post forecasts imports of soybean meal by Vietnam will reach 550 tmt, an increase of around 4% to meet the increasing animal feed production as well as the result of the Government's policy to exempt import tariffs on soybean meal, effective since early November 2000.

Vietnam's corn imports decreased sharply in 2001. Corn imports were down to 50 thousand metric tons in 2001 from more than 190 thousand metric tons in 2000. The large decrease was caused by increasing domestic corn production and a slight rise in the import tariff. Vietnam's corn production increased to 2.1 mmt in 2001 from 1.9 mmt in 2000 of which about 75% is utilized for animal feed production. The corn import tariff was raised to 7% from 5%. MARD is working on a plan to extend corn areas, especially the area planted with high protein corn varieties.

Table 4: Feed Demand, Strategic Indicator Table for Vietnam

FEED DEMAND				
STRATEGIC INDICATOR TABLES FOR [VIETNAM]				
MEAT PRODUCTION				
		Last Year	Current Year	Out Year Forecast
Calendar Year:	1999	2000	2001	2002

Poultry (Million, Head)	197	198	220	230
Poultry Meat (1000kg):	262	287	300	300
Eggs (Million pcs):	3,442	3,708	3,750	3,800
Pork meat (1000MT):	1,318	1,049	1,500	1,510
COMPOUND FEED SECTOR				
		Last Year	Current Year	Out Year Forecast
Calendar Year:	1999	2000	2001	2002
Compound Feed Capacity				
Total Feed Produced (MMT)	8.0	9.0	9.5	10.0
----- by home mixed producers	6.0	6.9	7.3	7.9
----- by commercial producers	2.0	2.1	2.2	2.4
FEED GRAIN USE				
		Last Year	Current Year	Out Year Forecast
Marketing Year:	1999	2000	2001	2002
Corn (Domestic consumption: feed)(TMT)	1,450	1,483	1,600	1,700
Other (specify) (rice bran & broken rice)	2,741	2,787	2,800	2,880
PROTEIN - ENERGY USAGE (TMT)				
		Last Year	Current Year	Out Year Forecast
Marketing Year:	1999	2000	2001	2002
Total Protein Meal (feed waste domestic consumption)				
Soy Bean Meal (feed waste domestic consumption)	630	630	640	670
Other Protein Meal, e.g. Palm Kernel Meal, Rape Meal, (feed waste domestic consumption)				

Fish Meal	63	64	64	65
Palm Crude Oil (feed waste domestic consumption)				
TRADE (Metric Tonnes)				
		Last Year	Current Year	Out Year Forecast
Calendar Year:	1999	2000	2001	2002
Corn				
Imports:	160,000	199,000	50,000	
Exports:	30		n/a	
Soy Beans				
Imports:				
Exports:				
Soy Bean Meal				
Imports:	510,000	400,000	520,000	550,000
Exports:				
Fish Meal				
Imports:	22,100	21,000	21,000	21,000
Exports:				
Palm Crude Oil				
Imports:				
Exports:				
PROTEIN PRODUCTS TARIFFS AND TAXES				
	Product	Bound Rate	Applied Rate	Other
	Description 1/	(%)	(%)	Import
Report Year:				Taxes/Fees (VAT)
0505.90	FEATHER MEAL		5	10
1501.00.00.60	YELLOW GREASE		10	10
1502.00.00.40	INEDIBLE TALLOW		10	10
1511	PALM OIL		5	10
1518	ANML/VG FTS &OILS		5	10
2301.10	MEAT AND BONE MEAL		10	5
2301.20	FISH MEAL		10	5

Final Note: Data used in this report are primarily drawn from official data of MARD and the General Statistics office. There is little independent verification of livestock population, production, and supply estimates. Export targets are routinely announced that are later (and quietly) reduced. Post based this report on the best data available, but would not be surprised to see significant revisions later.

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